

### C. PROPOSAL FORMAT

Response to this RFP must be in the form of a proposal package that must be submitted in the following format. **Please download ALL attachments to this document.** The Proposal Response Sheet and Utilization Report (*required documents*) should be the first two pages of your written response.

1. Cover Page/Proposal Response Sheet – Submit on letterhead stationary, signed by a duly authorized officer, employee, or agent of the organization/firm
2. Utilization Report ( *Separate Attachment Form* )
3. Comprehensive Response
  - a. Address services required specifics
  - b. Outline of how respondent can meet or exceed the minimum requirements
  - c. Detail of how the respondent is qualified to provide the services required
  - d. Provide a description of the web-based application system utilized
  - e. Provide work samples of any relevant publications, reports, policy and procedural recommendations from previous consulting engagements
4. Cost and Fees
  - a. Provide the applicable itemized fees and any commissions included in the proposal for the Services for each element in the scope of work (this includes a break-down of the cost proposed for any sub-consultant working in conjunction with your organization on the project). *Appendix 1 – separate attachment*
  - b. Explain any assumptions or constraints in a price proposal to perform the services.
  - c. Explain any additional charges or fees in the proposal.
5. Experience of the Respondent.

A sufficient description of the experience and knowledge base of the Proposer to show the Proposer's capabilities should be included in the Proposal. At a minimum, the description

of the experience and knowledge base of the Proposer included in the Proposal should include, but not necessarily be limited to, the following:

- a. A brief description of the history and mission of the Proposer, including the Respondent's background and mission statement, the length of time the Proposer has been in business, a description of the Proposer's organizational structure and a description of the Proposer's customer make-up;
- b. A statement of how long the Proposer has provided services similar to the Services requested herein;
- c. A general description of the Proposer's experience and background in providing services similar to the Services requested herein;
- d. Any other relevant information about the experience and knowledge base of the Proposer which is deemed to be material.
- e. Resume of each employee engaged in the services, including the role of each and an overview of their previous experience with similar projects.

#### 6. References

References of the Proposer, including at least three (3) other clients for whom the Proposer has provided services similar to the Services (with preference given to clients comparable to Shelby County Government) and, for each such reference, the business name, the identification of a contact person, the title of the contact person and a telephone number;

#### 7. Additional Information

- a. A description of any other resources available to the Proposer that will be useful in providing the Services;
- b. A description of the methods used by the Proposer to measure the satisfaction of its client.
- c. Any other relevant information about the capabilities of the Proposer deemed to be material.

## **XII. PROPOSAL EVALUATION AND SELECTION**

### **A. EVALUATION PROCESS**

1. Initial Review – All proposals will be initially evaluated to determine if they meet the following minimum requirements:

- a. The proposal must be complete, in the required format, and be in compliance with all the requirements of the RFP.
- b. Proposers must meet the Minimum Proposer Requirements outlined in Section II of this RFP.

2. Technical Review- Proposals meeting the above requirements will be evaluated on the basis of the following criteria:

- a. Each proposal will be reviewed by a special Ad-Hoc Committee which may elect to schedule a personal presentation and interview with one or more of the bidders. After the review process is completed, this committee will recommend the successful bidder to the Division Director, Finance and Administration, who makes the decision, subject to the approval of the contract by the Mayor and the Board of County Commissioners.

- b. All proposals submitted in response to this RFP will be evaluated based on the following criteria:

- i. Qualifications of personnel.
- ii. Ability to present a clear understanding of the nature and scope of the project.
- iii. Project methodology.
- iv. Previous experience with similar projects.
- v. Cost to the Shelby County Government as outlined in the budget estimate.
- vi. Time frame for completion.

3. Oral Presentation.

The Shelby County Government reserves the right to interview, or require an oral presentation from, any Respondent for clarification of information set forth in the Proposer's response. In this regard, at the discretion of the evaluation committee, some or all Proposers who submit an

Proposal in response to this RFP may be asked submit to an interview or give an oral presentation of their respective Proposals to the evaluation committee. If so, this is not to be a presentation restating the Proposal, but rather an in-depth analysis of certain qualifications of the Proposer. The interview or oral presentation, if utilized, is intended to provide an opportunity for the Proposer to clarify or elaborate on its qualifications without restating the Proposal. The interview or oral presentation is to be a fact finding and explanation session only and is not to be used to negotiate any terms of contract. If required, the time and location of such interview or oral presentation will be scheduled by the Administrator of Purchasing. Interviews and oral presentations are strictly an option of the Shelby County Government or its evaluation committee and, consequently, may or may not be conducted. All travel expenses to and from the interview or oral presentation shall be the responsibility of the Proposer.

Selection will be based on determination of which proposal best meets the needs of the County and the requirements of this RFP.

*Shelby County Government reserves the right to consider the vendor's EOC rating in all evaluations.*

#### B. CONTRACT AWARD

Contract(s) will be awarded based on a competitive selection of proposals received. The contents of the proposal of the successful Proposer will become contractual obligations and failure to accept these obligations in a contractual agreement may result in cancellation of the award. The County reserves the right to negotiate any portions of the successful Proposer's fees and scope of work or utilize their own resources for such work.

### DISCLOSURE OF BUSINESS AFFILIATION STATEMENT

The purpose of this disclosure statement is to inform the Purchasing Department, the Requesting Department, and/or Shelby County Government (the "County") of any possible conflicts of interest, financial or otherwise, that may exist between Consultants hired by County and other individuals/entities who seek to do business the County.

1. Name of Individual/Proposer Submitting Statement:
  
2. Description of any existing Work Relationship within Shelby County:
  
3. This Statement is Submitted (check one ONLY if an existing contract(s) with a County Department exists)
  - a. as a "single transaction" disclosure statement, as to my financial interest in a specific contract or purchase connected with the DEPARTMENT NAME of Shelby County Government which I serve on a contractual basis, proposed to be made by Shelby County Government with a particular contractor or vendor; or  
\_\_\_\_\_
  - b. as an "annual" disclosure statement, as to my financial interest connected with any contracts or purchase connected with the DEPARTMENT NAME of Shelby County Government which I serve on a contractual basis, proposed to be made by Shelby County Government with a particular contractor or vendor;  
\_\_\_\_\_
4. Name(s) of ALL Affiliated Individuals and/or Entity:

- 5. Description(s) of Business Relationship with Affiliates:** (Please detail the business relationship, the start and end dates of the business relationship, and a description of the economic benefit given to the Proposer by the affiliated individual/ entity.)
- 6. If the Business Relationship describe above in 5 is between an affiliate and a member of Proposer's household, please name the member and list the required information from 5.**

**NOTE: Any Disclosed Conflict of Interest may be waived with the Approval of the Purchasing Department.** (Note: If the disclosed conflict is waived, please resubmit another Disclosure Statement with the appropriate box in 3 checked.)

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**Submitter's Signature**

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**Date**

## ATTACHMENT

### Proposal Response Sheet

#### Consulting Services (Healthcare Programs), RFP # 08-004-75

Name of firm: \_\_\_\_\_

Firm's Website: \_\_\_\_\_

Mailing Address: \_\_\_\_\_  
\_\_\_\_\_

Remit Address: \_\_\_\_\_  
\_\_\_\_\_

Phone: \_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

Fax: \_\_\_\_\_

Payment Terms: \_\_\_\_\_

Authorized Representative: \_\_\_\_\_ Print: \_\_\_\_\_

Signature (Person authorized to negotiate with the County on behalf of the organization/firm.)

Email address: \_\_\_\_\_

Authorized Representative: \_\_\_\_\_ Print: \_\_\_\_\_

Signature (Person authorized to negotiate with the County on behalf of the organization/firm.)

Email address: \_\_\_\_\_

The signature (s) above indicates that certifies that:

- (i) the Proposer's signatory is an agent authorized to submit proposals on behalf of the organization/firm;
- (ii) all declarations in the proposal and attachments are true to the best of reasonable knowledge;
- (iii) all aspects of the proposal, including cost, have been determined independently, without consultation with any other prospective Proposer or competitor for the purpose of restricting competition;
- (iv) the offer made in the proposal is firm and binding for 90 days after receipt of the proposal by the County; and
- (v) all aspects of this RFP and the proposal submitted are binding for the duration if this proposal is selected and a contract awarded.

EOC #: \_\_\_\_\_ (If you do not have a valid EOC #, please contact the EOC Office at 901-545-4336)

\_\_\_\_\_ Check here if you qualify as a MBE \_\_\_\_\_, or WBE \_\_\_\_\_

(Minority or Woman owned Business Enterprise) If so, please indicate the classification below:

☐ African American    ☐ Hispanic American    ☐ Asian American    ☐ Native American    ☐ Other \_\_\_\_\_

\_\_\_\_\_ Check here if you qualify as an LOSB (Locally owned Small Business)

### Response Checklist:

Please make sure that basic information listed below is provided in your RFP before you submit your response.

- ☐ Cover Sheet/Proposal Response Sheet (Required)
- ☐ Utilization Report (Required)
- ☐ Comprehensive Response to Minimum Requirements & Required Services
- ☐ Cost & Fees
- ☐ Experience of Respondent
- ☐ References
- ☐ Additional Information (optional)

***(This checklist does not absolve the Respondent of any other required documentation indicated in the document not listed above. Please use the information highlighted above as a reference only)***

# RFP UTILIZATION REPORT

	MALE					FEMALE					
	Subtotals	White	African American	Hispanic	Asian Pacific Islander	Other	White	African American	Hispanic	Asian Pacific Islander	Other
Officials and Managers											
Professionals											
Technicians											
Sales Workers											
Office and Clerical											
Crafts workers (Skilled)											
Operative (Semi-Skilled)											
Laborers (Unskilled)											
Service Workers											
Totals											

How was the above information as to race or ethnicity established?  
☐ A) Visual Survey      ☐ B) Employee Records  
Please list the date for employment information reported \_\_\_\_\_, \_\_\_\_\_ Other Please Specify: \_\_\_\_\_

The Concept of race used by the Equal Employment Opportunity Commission does not denote clean-cut scientific definitions of anthropologic origins. For the purpose of this report an employee may be include in the group to which he or she appears to belong, identities with, or is regarded in the community as belonging. However, no person should be counted in more than one race/ethnic category

NOTE: 1 The Category "HISPANIC" while not a race identification is included as separates race/ethnic category because of the employment discrimination often encountered in this group; for this reason do not include HISPANIC under either "white" or "black".

For the purpose of this report the following race/ethnic categories will be used:

- a) The Category "White" (not of Hispanic origins): All persons having origins in any of the original peoples of Europe North Africa or Middle East.
- b) The Category "African American persons having origins in any of the original peoples of Africa
- c) The Category "Hispanic" All persons of Mexican, Puerto Rican, Cuban, Central or South American. For other Spanish culture regardless of race
- d) The Category "Asian or Pacific Islander". All

persons having origins in any of the original peoples of the Far East, Southeast Asia, the Indian Sub-Continent, or the Pacific Islands. This area includes for example, China, Japan, Korea, the Philippine Islands, and Samoa

e) The Category "American Indian or Alaskan Native": All persons having origins in any of the original peoples of North America, and who maintain cultural identification through tribal affiliation community recognition

Source: Bureau of the Census

Item #: 27

Prepared By: Marcy N. Ingram

Commissioner: MALONE

Approved By: \_\_\_\_\_

**ORDINANCE NO. 328**

**AN ORDINANCE TO AMEND CHAPTER 12, CODE OF  
ORDINANCES, SHELBY COUNTY GOVERNMENT, SO AS TO  
ESTABLISH A LIVING WAGE STANDARD**

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**WHEREAS**, A Civil Service Merit System for employees of Shelby County was established by the Private Acts of 1971, Chapter 110 § 1; and

**WHEREAS**, It is important to the health and welfare of all residents of Shelby County that working people are paid a wage that enables them to lift their families out of poverty; and

**WHEREAS**, The County awards taxpayer-funded contracts to businesses to provide services to the public and to the County government; and

**WHEREAS**, The purpose of this Ordinance is to ensure that Shelby County Government as well as businesses receiving service contracts from the County pay employees a living wage.

**NOW, THEREFORE, BE IT ORDAINED BY THE BOARD OF COUNTY COMMISSIONERS OF SHELBY COUNTY, TENNESSEE, That**

**SECTION 1.** Chapter 12, Code of Ordinances, Shelby County Government, be amended so as to create the following:

**Chapter 12  
Employees**

**Art. V Living Wage**

**12-113 --- 12-125**

**ARTICLE V – Living Wage**

**Section 12-113. Definitions:**

For purposes of this article, the following words, terms and phrases, when used in this article, shall have the meanings ascribed to them in this section, except where the context clearly indicates a different meaning: